

PROJECT PLAN v 3.0

(Approved by MTC Strategic Planning Steering Committee 12-10-15; as modified by project team 1-29-16)

PROJECT: MTC Outreach to Taxpayers and Practitioners

PROJECT TEAM: Rich Jackson (ID) MTC Vice-Chair; John Allan, attorney (Jones, Day); Thomas Shimkin, MTC staff; Shirley Sicilian, KPMG; Steve Cordi, MTC Executive Committee; Wood Miller, Chair, MTC Uniformity Committee

STAFF: Thomas Shimkin

FACILITATOR: Elizabeth Harchenko

PROJECT DESCRIPTION: The purpose of this project is to develop a systematic process for reaching out to taxpayers and SALT practitioners to facilitate the Commission's awareness of tax compliance issues of concern to taxpayers. The project will include development of recommended processes for addressing identified taxpayer concerns.

TARGET COMPLETION DATE: July 1, 2016

HIGH-LEVEL PROJECT TIME LINE:

- December 2015 – Identify team members **(Done)**
- January 2016 – First team meeting (teleconference). Review project description and project plan and make needed changes. Discuss research tools to use – email survey; telephone survey; in-depth interviews; who to contact; questions to be asked. Assign tasks. **(Done)**
- February 2016 – Team meeting (teleconference) agree on research tools and questions
- February to early April 2016 – Conduct research.
- March 2016 – Team meeting (teleconference) – check in on research progress. Report and discuss preliminary findings.
- Mid to late April 2016 – Team meeting (teleconference) Discuss research findings and develop preliminary conclusions. Any more research needed.
- May 2016 – Develop recommendations to MTC Steering Committee.
- June/July 2016 – Approve final report to MTC Steering Committee.

SCHEDULE FOR FRIDAYS; EARLY PM EDT

Estimated total time commitment for team members: 18 to 20 hours